

FIG. 1

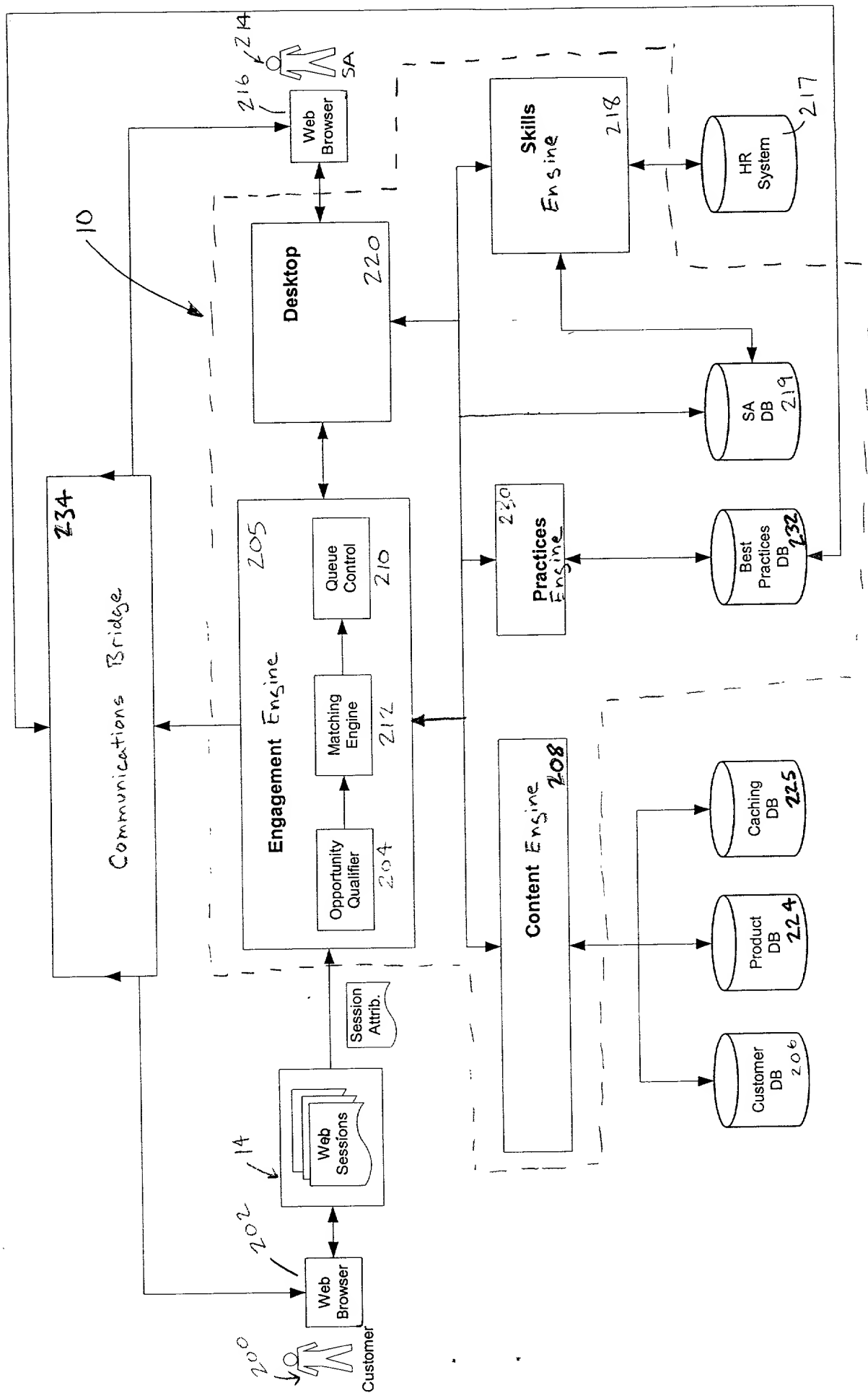


FIG. 2

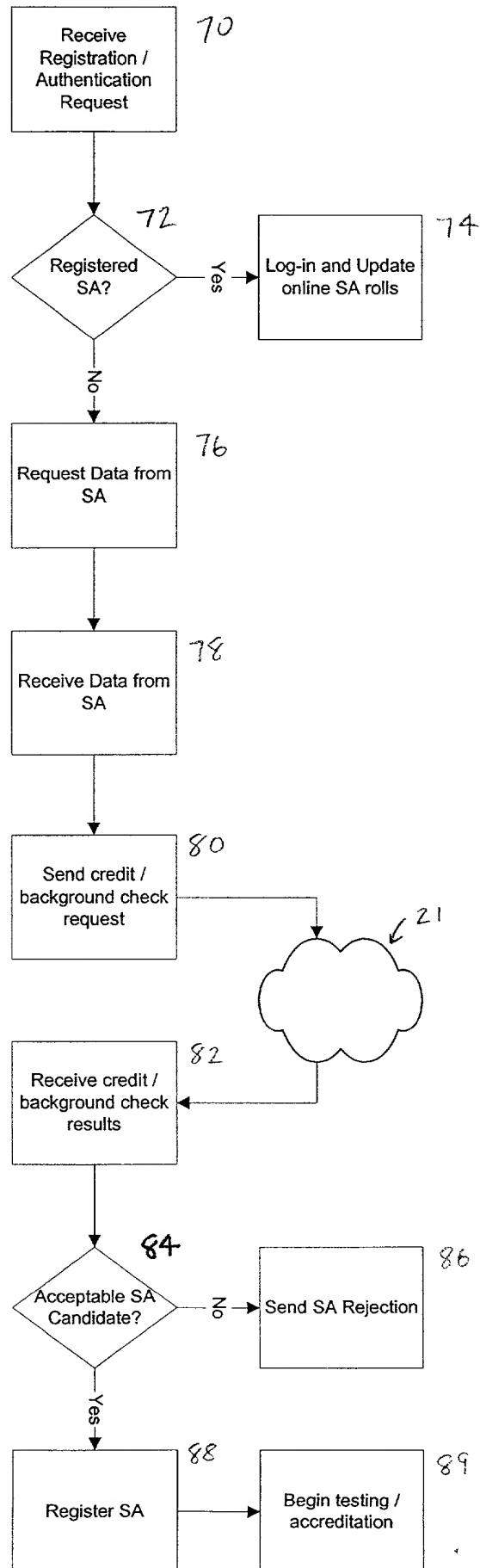


FIG. 3

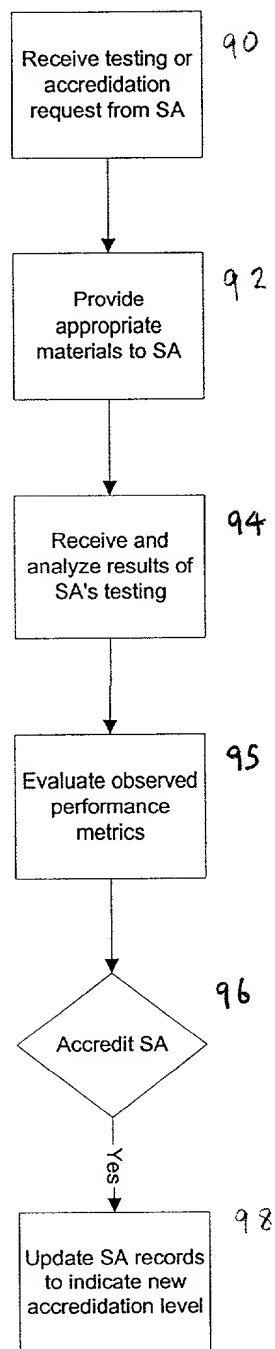


FIG. 4

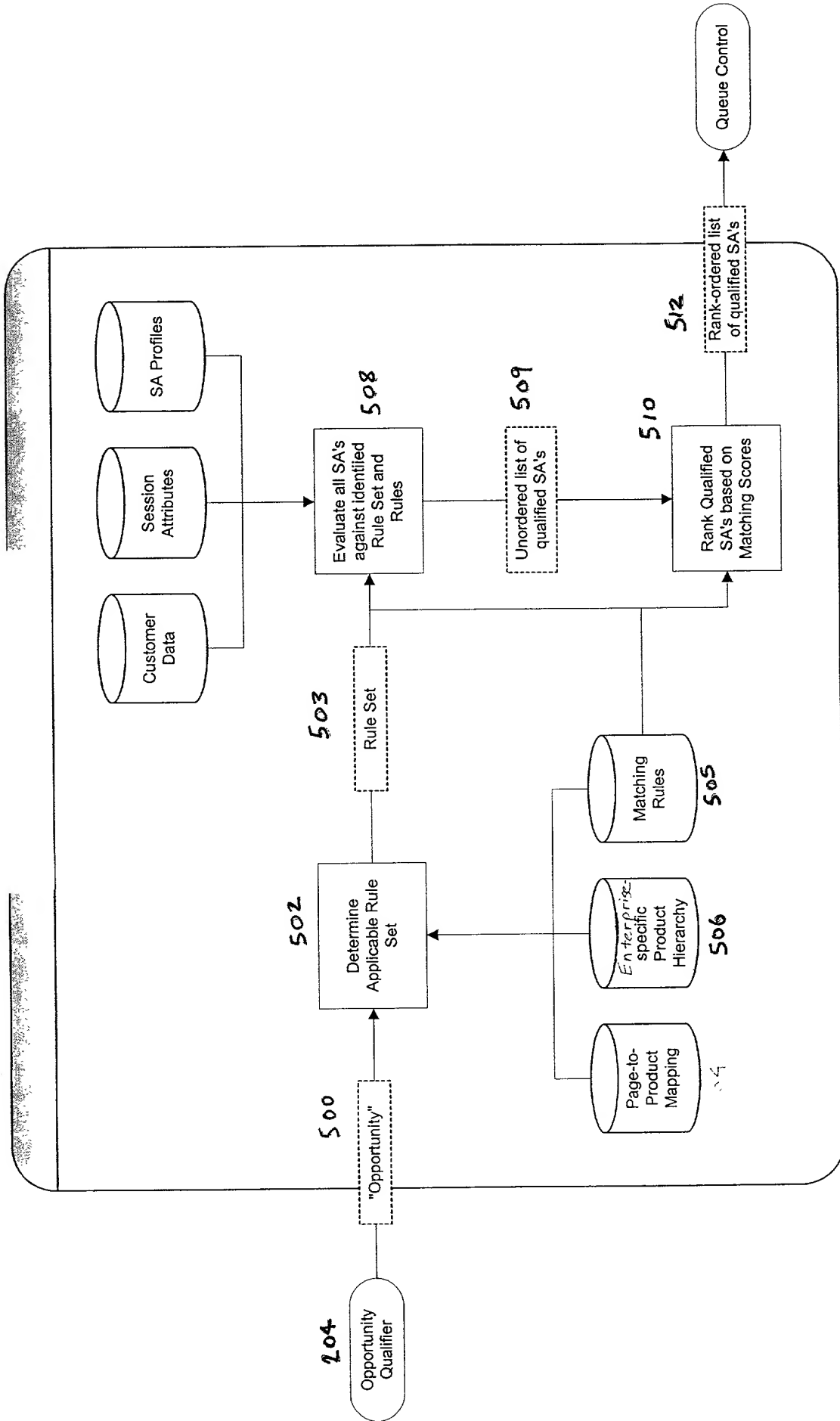


FIG. 5

Sales Office

Close side menu

Sales Floor Resources Certification Profile Community

Open all

Close all

Hide all

Show all

Logout

Daily Information

Browsing Customers

Product Resource Finder

Product Resource Library

Customer Profiles

Inbox

Filter Customize

Name	Value	Clicks	New Viewing	Time Browsing
Bob Henry	86	13	Mortgage Rates	62 minutes
Unknown (2)	95	12	Car Loan	38 minutes
Sally Smith	78	12	Checking Account Package	26 minutes
Unknown (4)	89	9	Brokerage Account	18 minutes
Unknown (5)	93	3	Internet Banking	8 minutes

Recommended Customer

New Customer

Flagged by SA

Customer Profiles

Customize

Name	Address	Phone	Relationship	Correspondance	Personal Notes
Cynthia Keppel	12200 Jefferson Square Decatur, GA 30030	Home: 404-292-3620 Work: 678-443-7348	Mortgage	1 Email New	3 Available
Alison Smith	294 Happy Dale Decatur, GA 30030	Home: 404-223-4455 Work: 619-734-9838	Car Loan	4 Emails Total 0 Email New	3 Available
Earnesto Santo Quarzo	724 Nashville Pike Union Town, PA 15401	Home: 724-769-9613 Work: 724-734-9786	Loans	12 Emails Total 34 Email New	7 Available
Kelly Hurst	423 Canyon Rd.	Home: 724-292-3620	Checking Account	67 Emails Total 1 Email New	9 Available

Inbox

Customize

From	Subject	Received
"Dave Letterman" (212)345-9023		3/22/01
Unknown (313)349-0593		3/22/01
jumpparound@aol.com		3/15/01
Unknown (409)689-3857		3/15/01
"Cyndi Brady"		3/01/01
goofoff@earthlink.net		2/25/01
"Alice Cranden"		2/25/01
Unknown (505)678-0984		2/15/01

Fax Message

Email Message

Phone Message

How many checks can I write a month?

Have mortgage rates changed today?

Can I review the loan agreement prior to closing

(No subject)

Fig.6

600

604

602

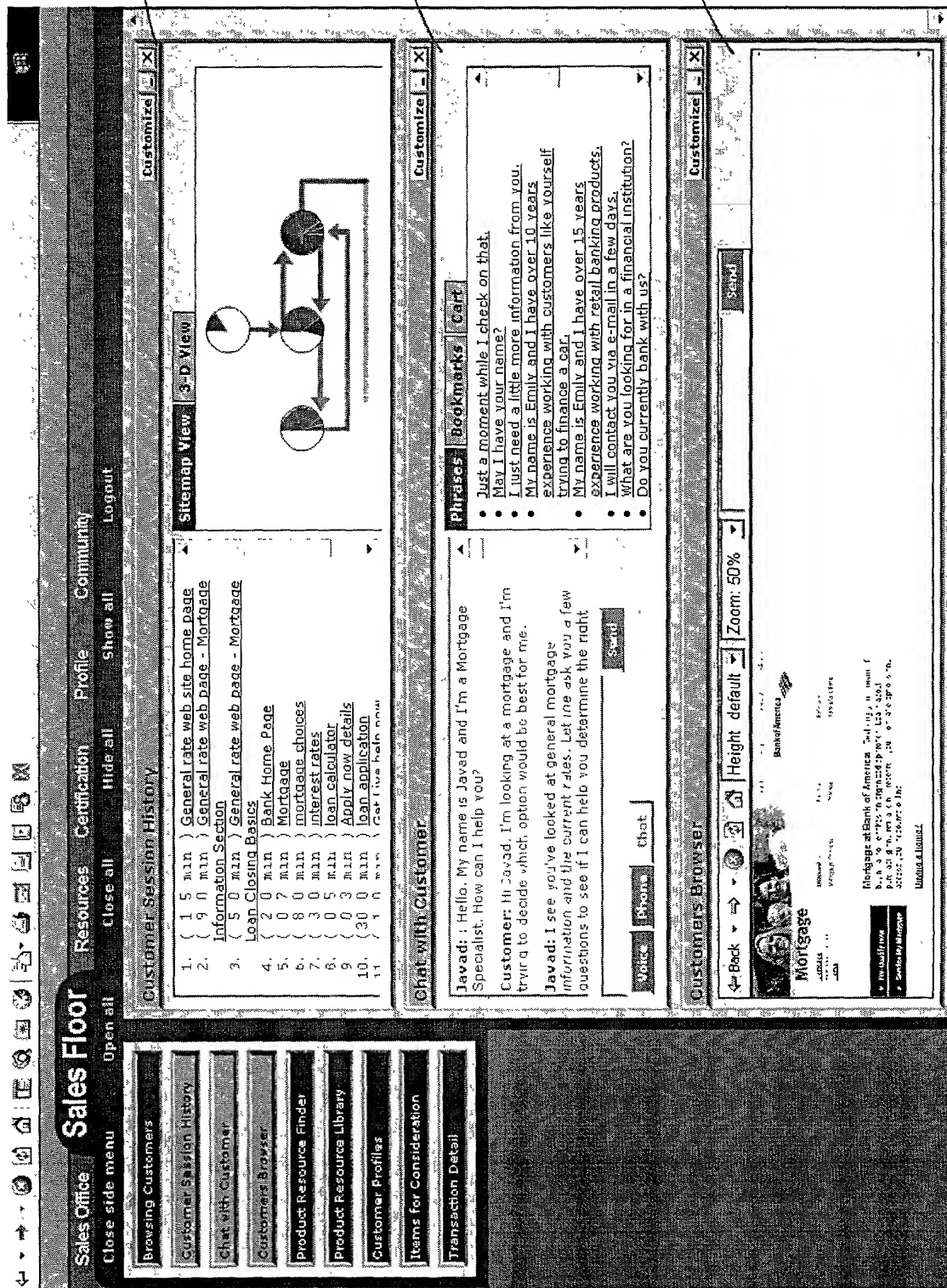
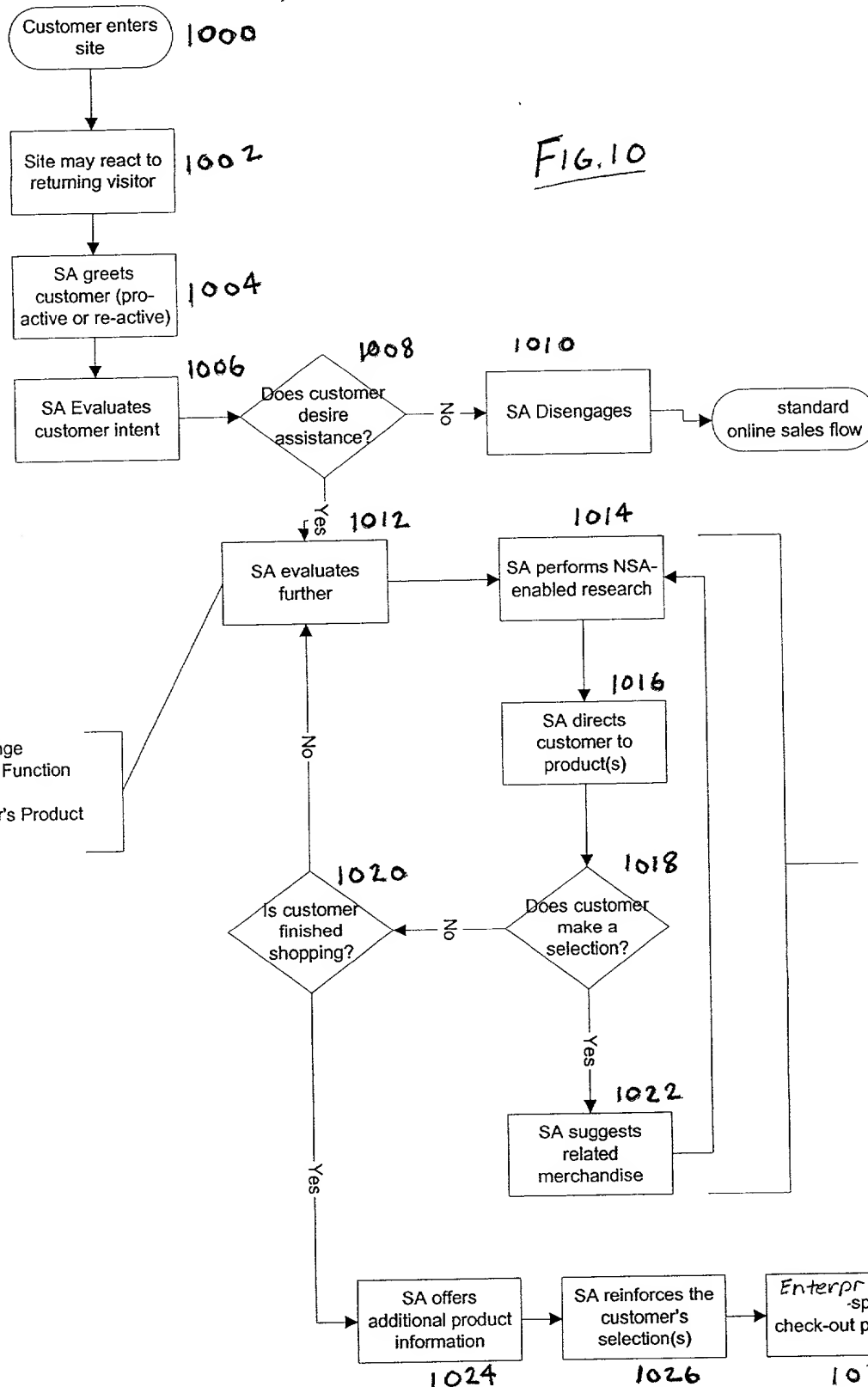


FIG. 7

Fig. 8



Post-transaction Follow-up / Proactive Relationship Management

